



## **Session 6:**

### **Period-Based Curricula (Advanced Topic)**

VA TMS Administrators  
Role-Based Training

Virtual Instructor-Led Training

Participant Guide

April 2014

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## 1.0 About This Training

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### 1.1 Training Purpose

The purpose of the VA TMS Administrators Role-Based Training Session 6: Period-Based Curricula is to provide detailed information about initial and retraining assignments within a curriculum and how to work with them in the VA TMS.

### 1.2 Target Audience

This session is an Advanced Topic training session for any VA TMS administrators with some experience in Period-Based Curricula that are looking for more in-depth instruction.

### 1.3 Training Length

This training will run for approximately 3.5 hours. Brief breaks will be given.

### 1.4 Participant Guide




This Participant Guide contains all key content presented in this training, including PowerPoint slides with room for taking notes, activities, and demonstrations for each lesson.

The Participant Guide is divided into two sections:

- About This Training
- Training Content

**NOTE: Print a hardcopy of this Participant Guide to use during training.** You will need to reference the steps for all demonstrations and activities in this guide while completing steps in the VA TMS.

### 1.4.1 Participant Guide Icons

Icons	Description
	This icon indicates that there will be a demonstration conducted by the instructor within the VA TMS.
	This icon indicates that participants will complete an activity.
	This icon indicates that there is a job aid available for the task.

## 1.5 Participant Preparation and Guidelines

### 1.5.1 Requirements

Participants must complete the following for this training:

- Register for training through the VA TMS.
- Print a hardcopy of this Participant Guide for use during the training. It will be difficult to access electronically during training.

### 1.5.2 Demonstrations and System Practice Activities in VA TMS

During this training, you will observe instructor demonstrations and complete system practice activities within the VA TMS. These demos and activities will allow you to study and apply what you've learned about the features, functions, and processes critical to your role within the VA TMS. The steps for each demonstration and system practice activity have been provided in this guide so you can follow-along. You may also want to reference these steps after the training.

### 1.5.3 Virtual Instructor-Led Training Guidelines

This training will be delivered as a Virtual Instructor-Led Training (VILT) using a Web conferencing software program. You will need a computer and phone with speakers or headset in order to participate in this training. Follow the guidelines below to ensure the best training experience:

- Print a hardcopy of the Participant Guide for use during training.
- Be sure to log in to the Web conferencing software and dial in to the conference line 5 – 10 minutes early.

- Mute your phone line for the duration of the training session unless otherwise instructed.
- Use the chat feature for any questions during the session.
- The instructor may be able to answer your question immediately. Otherwise, he or she will answer at the end of the training, or send an e-mail afterward.

## 1.6 VA TMS Administrators Role-Based Training Sessions and Target Audiences

The table below includes a list of all training sessions in this training series, along with the target audience.

Session	Required for	Recommended for
<b>Session 1: Introduction to VA TMS for All Administrators and Help Desk and Reports Managers</b>	<ul style="list-style-type: none"> <li>• Help Desk (as stand-alone training)</li> <li>• Reports Managers (as stand-alone training)</li> <li>• Assignment Managers</li> <li>• Scheduling Managers</li> <li>• Registration Managers</li> <li>• Domain Managers</li> <li>• Learning Managers</li> <li>• Item Managers</li> <li>• AP Managers</li> </ul>	n/a
<b>Session 2: VA TMS Training for Scheduling Managers, Assignment Managers, and Registration Managers</b>	<ul style="list-style-type: none"> <li>• Assignment Managers</li> <li>• Scheduling Managers</li> <li>• Registration Managers</li> </ul>	<ul style="list-style-type: none"> <li>• Domain Managers</li> <li>• Learning Managers</li> <li>• Item Managers</li> <li>• AP Managers</li> </ul>
<b>Sessions 3–5: VA TMS Training for Domain Managers, Learning Managers, and Item Managers</b>	<ul style="list-style-type: none"> <li>• Domain Managers</li> <li>• Learning Managers</li> <li>• Item Managers</li> </ul>	n/a

**NOTE:** Sessions 6-10 are advanced topics that are optional for managers who already have experience using the VA TMS.

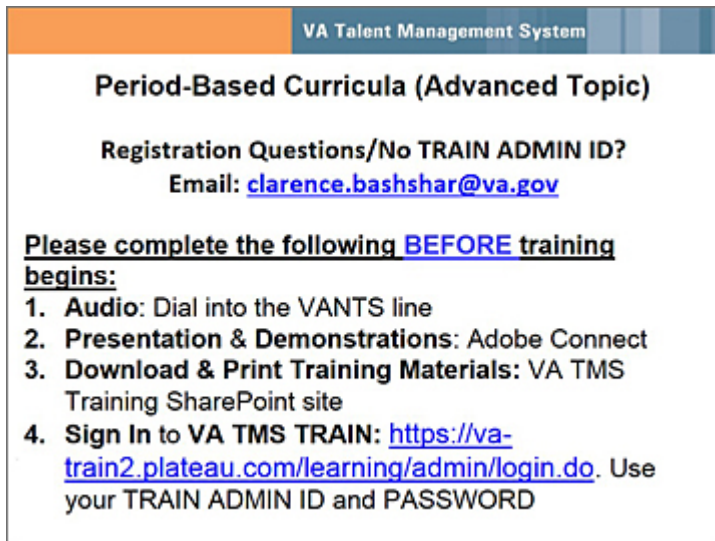
## 1.7 VA TMS Functions and Associated Roles

**NOTE:** Gray columns indicate add-on roles; white columns indicate stand-alone roles.

VA TMS Admin Function	LM	DM	IM	RM	SM	AM	APM	HD	PR	QEM	CM	CIM	HR	RPT	AHN	PM	COM	ACM	ACIM	MSE	MSEHD
Unlock User Accounts	X							X	X												
Reset User Passwords	X							X	X												
Change Supervisors for a group of Users	X																				
Proxy into Users accounts	X							X													
Add/Remove Items to/from Learning Plan	X					X															
Add/Remove Curricula Assignments	X					X															
Record Item/External Event/Scheduled Offerings	X			X																	
Edit/Delete Recorded Learning Events	X			X																	
Merge User Records		X																			
Add/Edit Items	X		X																		
Add/Edit Curricula	X		X																		
Send Notifications	X														X						
Add/Edit Scheduled Offerings	X				X																
Register Users into a Scheduled Offerings	X			X	X																
Edit User's Registration in Scheduled Offering	X			X	X																
Assign/Remove Competency Profiles to/from Users											X										
Assign/Remove Competencies to/from Users											X										
Manage Administrator Accounts		X																			
Add/Edit/Copy/Delete Assignment Profiles							X														
Edit User Preferred Accreditations	X							X										X			
Edit User Occupational Categories	X							X										X			
Add/Edit/Delete Competencies											X										
Add/Remove Competencies from Items												X									
Add/Edit/Delete Competency Profiles											X										
Enter/Delete Competency Assessments for Users	X			X		X					X										
Add/Edit/Delete Questions										X											
Add/Edit/Delete Exam Objects										X											
Assign/Remove Questions to/from Exam Objects										X											
Add Questionnaire/Surveys										X											
Unassign a Survey from Users	X																				
Edit Organization Dashboard Ownership		X																			
Add/Edit Accreditations																		X			
Apply Accreditations to Items																		X	X		
View sensitive information on Users Records													X								
Create and Manage Communities																	X				
Run various Standard and Custom Reports	X		X	X	X	X							X	X							
View Self Enrolled User	X					X		X												X	X
Validate Self Enrolled User																				X	
Bookmark Available Entities	X		X	X	X	X		X													
Download Search Results	X		X	X	X	X	X	X	X	X	X	X	X	X		X	X	X	X	X	X

## 2.0 Training Content

### 2.1 Welcome



VA Talent Management System

**Period-Based Curricula (Advanced Topic)**

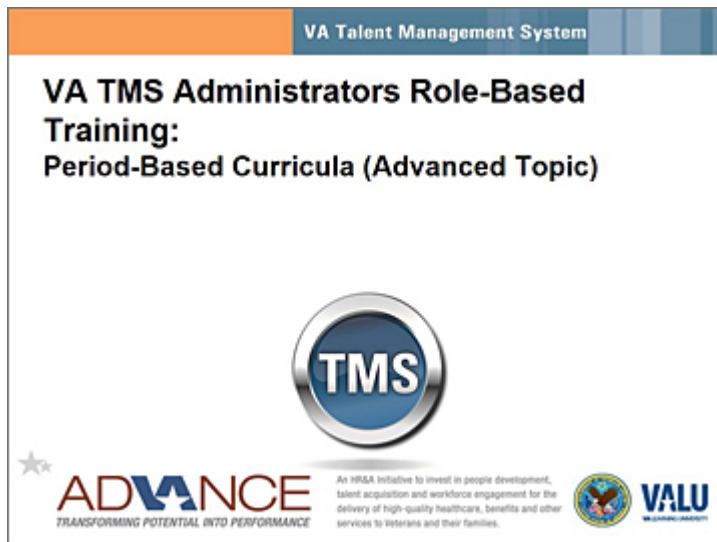
**Registration Questions/No TRAIN ADMIN ID?**  
Email: [clarence.bashshar@va.gov](mailto:clarence.bashshar@va.gov)

**Please complete the following BEFORE training begins:**

1. **Audio:** Dial into the VANTS line
2. **Presentation & Demonstrations:** Adobe Connect
3. **Download & Print Training Materials:** VA TMS Training SharePoint site
4. **Sign In to VA TMS TRAIN:** <https://va-train2.plateau.com/learning/admin/login.do>. Use your TRAIN ADMIN ID and PASSWORD


Notes:


Slide 1: Session Preparation




VA Talent Management System

**VA TMS Administrators Role-Based Training:**  
**Period-Based Curricula (Advanced Topic)**



 TRANSFORMING POTENTIAL INTO PERFORMANCE

An HRSA Initiative to invest in people development, talent acquisition and workforce engagement for the delivery of high-quality healthcare, benefits and other services to Veterans and their families.



Notes:

Slide 2: VA TMS Administrators Role-Based Training:  
Period-Based Curricula (Advanced Topic)

Advanced Topics

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### Session Agenda

- Welcome and Introductions
- Lesson 1: Period-Based Curriculum Overview
- Lesson 2: Determining Required-By Dates
- Lesson 3: Setting Required Dates within an Item
- Lesson 4: Required Dates Editor and Learning Event Synchronization
- Question and Answer

3

Notes:

Slide 3: Session Agenda

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### Session Objectives

After completing this session, you will be able to:

- Determine initial and retraining dates
- Set required dates within an item
- Use the Required Dates Editor

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Notes:

Slide 4: Session Objectives

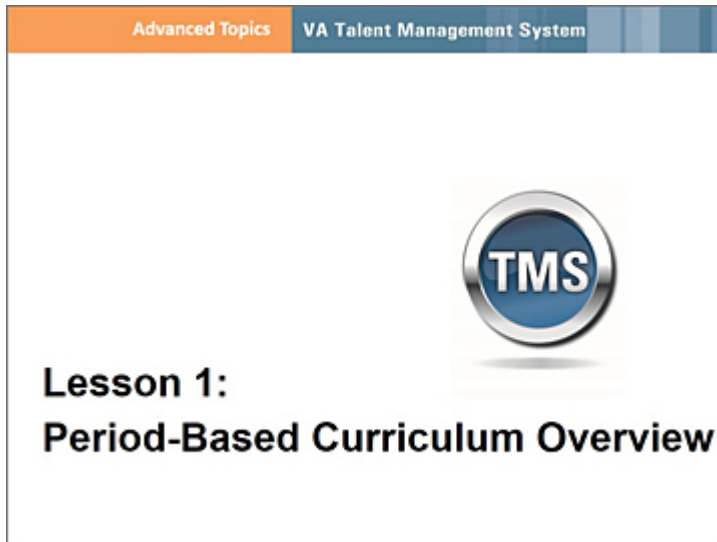
## Introductions

- Name
- Division of VA
- Experience with VA TMS
- Personal training goal

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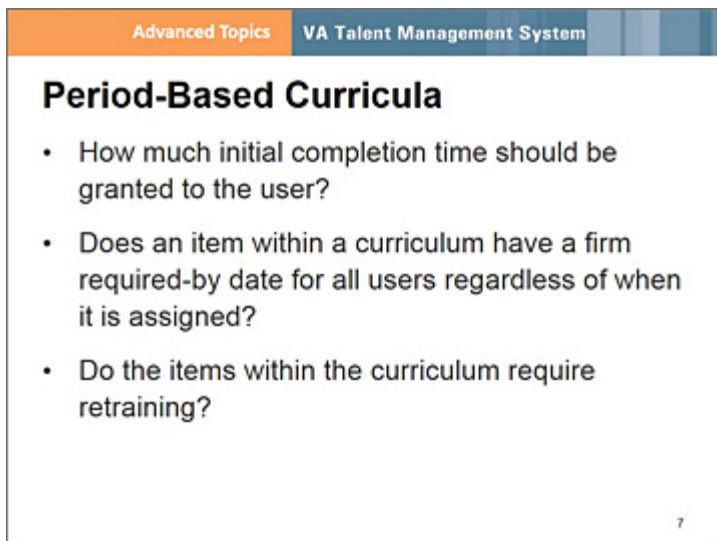
Slide 5: Introductions

## 2.2 Lesson 1: Period-Based Curriculum Overview



Notes:

Slide 6: Lesson 1: Period-Based Curriculum Overview



Notes:

Slide 7: Period-Based Curricula

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## Retraining

- Items that must be repeated on recurring intervals will have a Retraining assignment
- Once the item is complete and recorded, it is flagged as complete
- The next Required-By date will be calculated by the Retraining assignment

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Notes:


Slide 8: Retraining

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## Item Settings

Each item in a curriculum has the following settings:

- Initial Assignment
- Retraining Assignment
- Basis Date
- Effective Date
- Assignment Type



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Notes:

Slide 9: Item Settings

## Effective Date

- A user must complete a required item before the effective date to avoid a curriculum status of Incomplete
- If an effective date is in the future, it will not impact the overall completion status of the curriculum
- Effective dates only impact Incomplete and Complete curricula status and do not change required dates

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Slide 10: Effective Date

## Assignment Type

The assignment type is a status assigned to an item that indicates the level of importance to the user, such as:

- Required
- Optional
- Recommended

A user must complete all required items to obtain a Complete curriculum status.

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Slide 11: Assignment Type

## Event vs. Calendar Basis

Admins have two options available when setting initial and retraining assignments:

- Event Basis: Hire date or assignment date only
- Calendar Basis: A particular date on the calendar

**Note:** You will see Calendar Basis on your screen, but the VA does not use Calendar Basis requirements.

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Slide 12: Event vs. Calendar Basis

## Event Basis

Using event basis, the VA TMS calculates the required date by completing the current period and then adding the initial/retraining assignment.

Triggers for required date calculation to begin:

- Assignment Date (initial assignment)
- Learning History completion date (retraining basis event)

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Slide 13: Event Basis

## 2.3 Lesson 2: Determining Required-By Dates

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**Lesson 2:  
Determining Required-By Dates**

Notes:

Slide 14: Lesson 2: Determining Required-By Dates

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**Period Start Date**  
Always remember:

- The system has to complete the current period (day, month, year, quarter) before it can begin counting a new one

Notes:

Slide 15: Period Start Date

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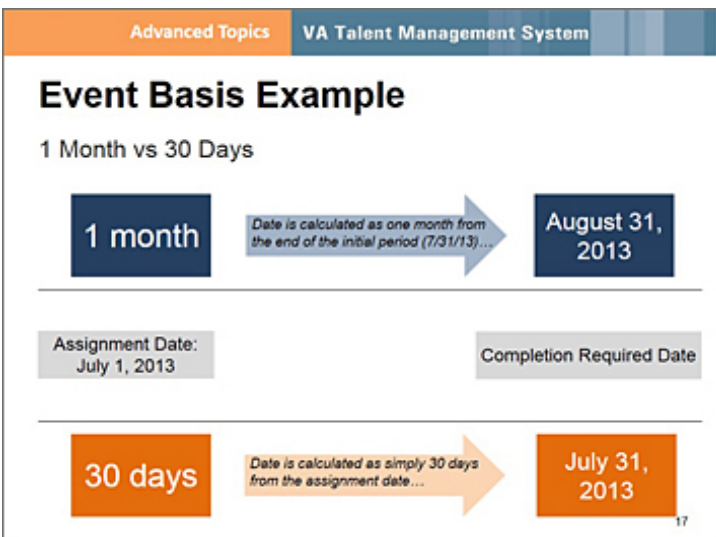
VA Talent Management System

Required Dates Practice

Assignment	Date Period	Number	Due Date
03/15/2013	Years	1	12/31/2014
03/15/2013	Days	365	03/15/2013
03/15/2013	Months	6	09/30/2013
03/15/2013	Days	183	09/15/2013
03/15/2013	Quarters	1	06/30/2013
03/15/2013	Months	3	06/30/2013
03/15/2013	Days	90	06/15/2013

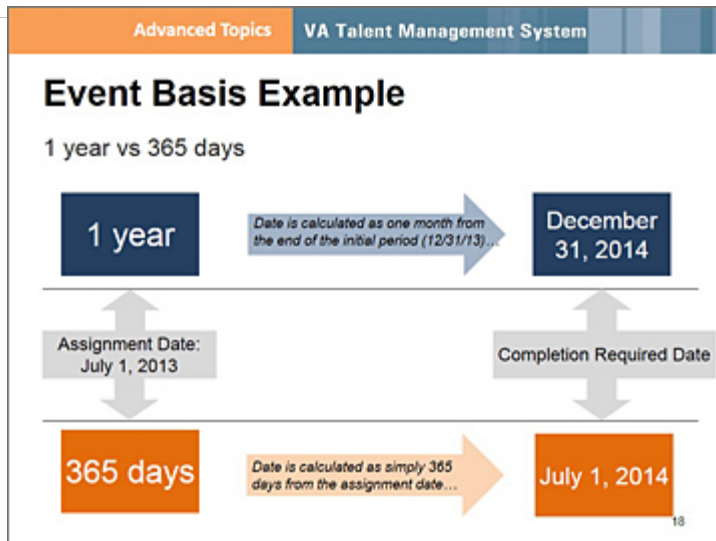
Notes:

Slide 16: Required Dates Practice



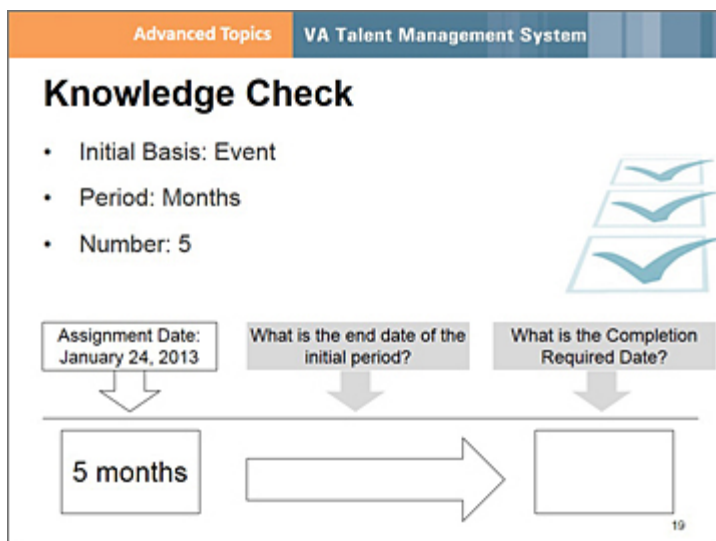
Notes:

Slide 17: Event Basis Example



Notes:

Slide 18: Event Basis Example




Notes:

Slide 19: Knowledge Check

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## Knowledge Check

- Initial Basis: Event
- Period: Days
- Number: 365



Assignment Date: January 01, 2013

What is the end date of the initial period?

What is the Completion Required Date?

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365 days

→

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Notes:

Slide 20: Knowledge Check

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## Knowledge Check

- Initial Basis: Event
- Period: Year
- Number: 1



Assignment Date: January 01, 2013

What is the end date of the initial period?

What is the Completion Required Date?

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1 year

→

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Notes:

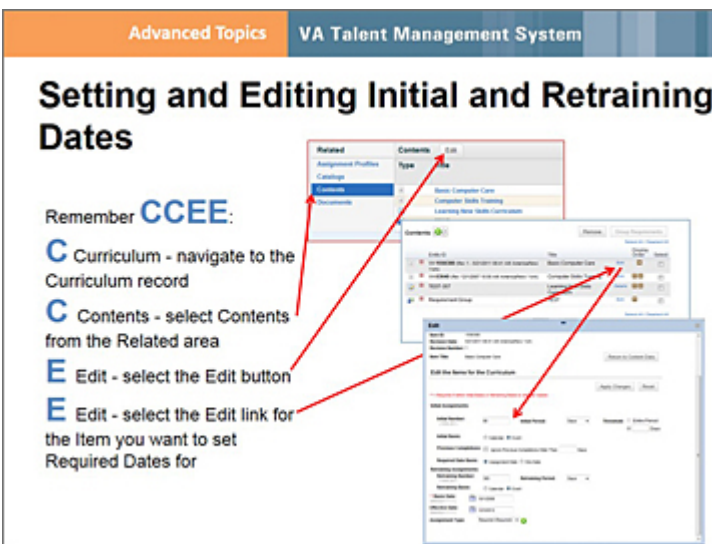
Slide 21: Knowledge Check

## 2.4 Lesson 3: Setting Required Dates within an Item



Notes:

Slide 22: Lesson 3: Setting Required Dates within an Item



Notes:

Slide 23: Setting and Editing Initial and Retraining Dates



## **Demonstration: Setting Required-By Dates in a Curriculum**

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Slide 24: Demonstration: Setting Required-By Dates in  
a Curriculum



## **Demonstration: Setting Required-By Dates in a Curriculum**

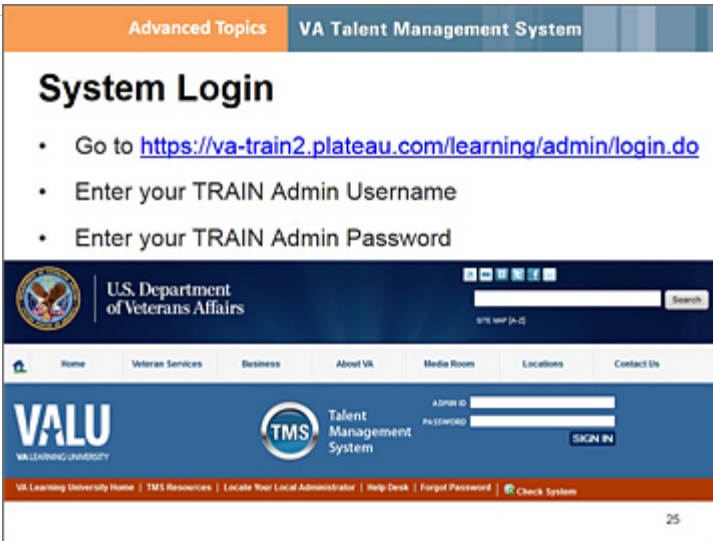
For this demonstration, you will find a curriculum, copy it to make it your own, and set dates.

1. Navigate to **Learning > Curricula**.
2. Search for and select a curriculum.
3. Select **Contents** from the Related area of the record.
4. Select the **Edit** button (do not select the item title; this will navigate you to the item entity).
5. Locate the item to modify and select the **Edit** link.
6. In the Initial Assignments section, enter an initial number.
7. Select **days** as initial period.
8. Select **event** as initial basis.
9. In the Retraining Assignments section, enter a retraining number.
10. Select **days** as the retraining period.

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## System Login

- Go to <https://va-train2.plateau.com/learning/admin/login.do>
- Enter your TRAIN Admin Username
- Enter your TRAIN Admin Password



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Notes:

Slide 25: System Login

Advanced Topics VA Talent Management System

## Activity #1: Setting Required-By Dates within a Curriculum

System Practice



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Notes:

Slide 26: Activity #1: Setting Required-By Dates within a Curriculum



### Activity #1: Setting Required-By Dates within a Curriculum

1. Navigate to **Learning > Curricula**.
2. Search for and select a curriculum.
3. Select **Contents** from the Related area of the record.
4. Select the **Edit** button (do not select the item title; this will navigate you to the item entity).
5. Locate the item to modify and select the **Edit** link.
6. In the Initial Assignments section, enter an initial number.
7. Select **days** as initial period.
8. Select **event** as initial basis.
9. In the Retraining Assignments section, enter a retraining number.
- 10.** Select **days** as the retraining period.

## Knowledge Check

What does the effective date of an item within a curriculum impact?

- a) Required-By date
- b) Curriculum status
- c) Both A & B
- d) None of the above



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Slide 27: Knowledge Check

## Knowledge Check

The system always calculates Required Dates in days.

- a) True
- b) False



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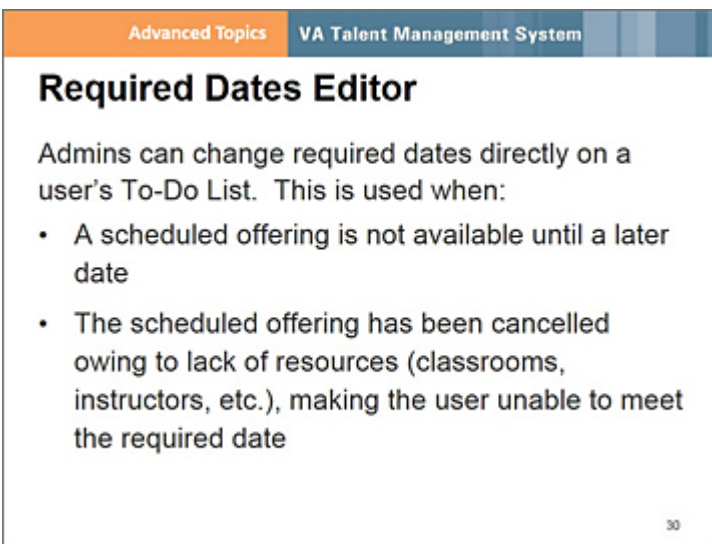
Slide 28: Knowledge Check

## 2.5 Lesson 4: Required Dates Editor and Learning Event Synchronization



Notes:

Slide 29: Lesson 4: Required Dates Editor and Learning Event Synchronization



Notes:

Slide 30: Required Dates Editor



## Demonstration: Required Dates Editor

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Slide 31: Demonstration: Required Dates Editor



## Demonstration: Required Dates Editor

Admins use the Required Dates Editor to update required dates using the same method as assignment. For example, if an admin assigned Item A via curriculum 1, then he/she must update the required date by specifying Item A in curriculum 1 in the Required Dates Editor. Likewise, if an admin assigned an Advanced Project Management item directly to a user's To-Do List, then he/she must specify the item in the Required Dates Editor.

1. Navigate to **Learning > Tools > Required Dates Editor**.
2. Select the **add one or more** from list link to add users.
3. Enter search criteria to search for users.
4. Select **Search**.
5. Check the **Add** checkboxes next to each user who needs a required date change.
6. Select **Add**.
7. Select **Next**.
8. Select the **add one or more from list** link to search for curricula to add.
9. Enter search criteria.
10. Select **Search**.
11. Check **Add** next to each curriculum to add.
12. Select **Add**.
13. Select **Next**.
14. Select **Next**.
15. Enter a new required date for each item listed.
16. Select **Finish** to finalize the Required Dates Editor.

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## Learning Event Synchronization

This process:

- Verifies the learning events of users
- Recalculates required dates
- Overrides all manually updated required dates, including those updated with the Required Dates Editor
- Resets them to calculated dates based on the item assignment

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Notes:


Slide 32: Learning Events Synchronization

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## Knowledge Check

Where is the Required Dates Editor located in the VA TMS? What is the path?

- a) Tools > Required Dates Editor
- b) User > Tools > Required Dates Editor
- c) Learning > Tools > Required Dates Editor



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Notes:

Slide 33: Knowledge Check

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## Evaluation & Self-Certification Reminder

- You will be prompted to complete the Evaluation and then you can complete your Self-Certification for this session.
- Evaluations can be found on your To-Do List.



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Notes:

Slide 34: Evaluation & Self-Certification Reminder

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## Questions?



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Notes:

Slide 35: Questions?